

PENSION SYSTEM RESUMPTION (PSR) PROJECT
FEBRUARY STATUS REPORT
March 18, 2009

	Task	Start	Finish	Status	Risks/Issues
1	Pension System Resumption (PSR) Project	02/09/05	04/19/10	<ol style="list-style-type: none"> 1. The Detailed Design Phase, which launched in May 2008, successfully completed on February 2. Over the last nine months, more than 120 CalPERS staff participated with the PSR Team in 220 design sessions to produce the Detailed Design deliverable, which consists of 44,000 pages of business process, procedure and screen layouts. 2. The Financial System Integration Project is ahead of schedule in the development of financial services for the PSR solution. The Team is also making good progress on defining the future business processes for receivables, invoices, and customer accounts. 3. PSR staff are in discussion with the State Controller's Officer (SCO) regarding the use of SCO legacy system data as a contingency for the PSR solution. Due to workload impacts on SCO driven by the furlough program implementation, no discussions occurred during February. Discussions have been scheduled for March. 4. In conjunction with PERT, the PSR Team is developing contingency options for employers who cannot comply with the new reporting requirements for enrollment and contribution data by PSR Go-Live. The schedule and cost implications for each option are under analysis with an expected completion in March. 	<ol style="list-style-type: none"> 1. With the postponement of the 21st Century Project, SCO may not be able to provide all of the data PSR expects to receive (e.g., CalPERS unique identifier, retired annuitant hours worked, tax deferred contribution details, Supplemental Investment program data). CalPERS continues to work with SCO to minimize impacts.

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2	Enterprise Transition Management (ETM) Project	7/30/2007	10/19/2010	<ol style="list-style-type: none"> 1. A transition management planning tool was distributed to the Program Areas to help them identify specific division impacts and gaps and the activities they need to prepare for the new my CalPERS. The specific transition management activities will be included in the division transition readiness plans. 2. The results from the second Change Readiness Assessment are being analyzed and documented. This data will be used to design communication and transition support activities to address division-specific change readiness needs. The findings will be communicated to stakeholders in late March. 3. The Team continues to partner with PSR's End-to-End team and business Division Coordinators to facilitate system demonstrations at section and unit level meetings. These demonstrations provide real world scenarios, specific to Program Areas, of how work activities will be conducted in the new environment. 4. The ITSB Transition Team is preparing detail requirements and procedures for the core processes. The team scheduled a series of walkthroughs to gain a common understanding of the use of these processes to support the new my CalPERS. 	<ol style="list-style-type: none"> 1. The consolidation and redesign of the 10 core IT processes represents major change within ITSB and is proving to be a larger effort than originally anticipated. ITSB Senior management is engaged to resolve any issues that arise.

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3	Public Employer Readiness Team (PERT)	03/01/08	06/18/10	<ol style="list-style-type: none"> 1. PERT launched the second phase of employer education targeting the nearly 450 employers who have elected to report payroll contributions using an electronic file. Between February and May 2009, it is planned that an estimated 60 “face-to-face” group meetings will be conducted statewide to explain, in detail, the changes employers need to consider in order to transition to myCalPERS. The goal of the meetings is to identify and evaluate employers’ transition constraints. To date, the PSR and PERT Teams have met face-to-face with 40 of the targeted employers. Of these 40, 100% said they are working toward complying with the new PSR formats; approximately 90% indicated they will be ready to comply in advance of the PSR implementation date. 2. With the approval of the PSR-ETM Steering Committee, PERT began planning the activities associated with preparing Direct Authorization Vendors to be ready for the implementation of myCalPERS. PERT is working with the Benefits Services Division to identify the vendor business volumes and with PSR to define transition requirements. 3. Agreements were finalized with 8 Health Carriers on the format and content of their PSR reporting methods. In compliance with the Health Insurance Portability and Accountability Act (HIPAA), Health Carriers will use the participant’s social security number (SSN) for enrollments. 4. The PERT Project Schedule was re-baselined in February 2009 to realign the project’s activities with PSR’s new April 2010 Go-Live date. The new schedule extends the completion of Phase Two Employer Education from May to September 2009 and employer testing to January 2010. 	